## **Employee Post-Travel Disclosure of Travel Expenses**

Date/Time Stamp:

SECRETARY OF THE SENATE.
PUBLIC RECORDS

2019 OCT 28 PM 2: 09

Post-Travel Filing Instructions: Complete this form within 30 days of returning from travel. Submit all forms to the Office of Public Records in 232 Hart Building.

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(Revised 1/3/11)

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached: ☑ The <u>original</u> Employee Pre-Travel Authorization (Form RE-1), <u>AND</u> A copy of the Private Sponsor Travel Certification Form with all attachments (itinerary, invited list, etc.) Private Sponsor(s) (list all): The Heritage Foundation Travel date(s): October 10-11, 2019 Name of accompanying family member (if any): None Relationship to Traveler: 

Spouse ☐ Child IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.) **Expenses for Employee:** Transportation **Lodging Expenses** Meal Expenses Other Expenses Expenses (Amount & Description) ☐ Good Faith \$100.00 - 32 \$96.00 \$93.15 \$5.00 - George C Estimate Marshall Museum ticket passenger coach bus ☑ Actual Amount Expenses for Accompanying Spouse or Dependent Child (if applicable): Meal Expenses Transportation Lodging Expenses Other Expenses Expenses (Amount & Description) ☐ Good Faith None None None None Estimate ☐ Actual Amount Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): (Printed name of traveler) TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER: I have made a determination that the expenses set out above in connections with travel described in the Employee Pre-Travel Authorization form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

(Signature of Supervising Senator/Officer)

Form RE-2

(Date)

(Revised 10/19/15)

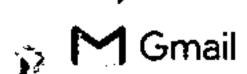
Date/Time Stamp:

#### **EMPLOYEE PRE-TRAVEL AUTHORIZATION**

ETHIC SEP24\*19ph 5:10 Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the Select Committee on Ethics in SH-220. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure. Michael Callesen Name of Traveler: Senate Committee on Foreign Relations Employing Office/Committee: The Heritage Foundation Private Sponsor(s) (list all):\_\_\_\_\_ October 10, 2019 to October 11, 2019 Travel date(s): Note: If you plan to extend the trip for any reason you must notify the Committee. Lexington, VA
Destination(s):\_\_\_\_ Explain how this trip is specifically connected to the traveler's official or representational duties: This event is the culmination of the Heritage Foundation's George C. Marshall Fellowship Program, which intends to foster an appreciation for the development of grand strategy and the practice of strategic leadership. This event is a simulation of the 1945 Yalta Conference, which will test and improve my negotiating abilities and deepend my appreciation for a broad, strategic understanding of foreign policy. This will benefit me greatly as a congressional staffer working in a national security position. Name of accompanying family member (if any): N/A Relationship to Employee: Spouse Child I certify that the information contained in this form is true, complete and correct to the best of my knowledge: TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain): Senator James E. Risch Michael Callesen hereby authorize (Print Traveler's Name) (Print Senator's/Officer's Name) an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain. I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box)

(Signature of Supervising Senator/Officer)

Form RE-1



2019 George C. Marshall Fellowship

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Thu, Feb 7, 2019 at 12:50 PM

Dear Michael,

Congratulations! It is with great pleasure that we accept you—to the George C. Marshall Fellowship Class of 2019.

The fellowship will commence on Friday, March 22nd with an orientation session at The Heritage Foundation's 227 Pennsylvania Avenue SE building. Attached you will find the 2019 calendar of events. Through your acceptance you are agreeing to attend all sessions and trips. For Congressional and Senate staff, we will contact you directly to provide you with all forms necessary for Ethics Committee compliance on all trips.

If you have any question or concerns, please do not hesitate to reach ou to Brandon Palumbo at brandon.palumbo@heritage.org or at 202-675-1784,

Congratulations again, and we look forward to welcoming yo to the Marshall Fellow community!

Sincerely,

Thomas Spector
Devector, Center for National Defense
The Heritage Foundation
214 Massachusetta Avenue, NE
Washington, DC 20002
202-608-6074
heritage.org

2019 Marshall Fellowship Calendar.pdf 121K



### 2019 George C. Marshall Fellowship

Friday, March 22 Orientation

The Heritage Foundation, 227 Pennsylvania Ave. SE

 $12:30 \ pm - 6:30 \ pm$ 

Thursday, April 18 Dinner & Discussion w/ Paul Lettow

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \ pm - 8:30 \ pm$ 

Thursday, May 9 Marshall Fellowship Alumni Reception

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \ pm - 8:30 \ pm$ 

Friday, May 31 Day Trip

Gettysburg Battlesield Staff Ride

Gettysburg, PA. We will depart early and return late.

Thursday, June 13 Dinner & Discussion w/ Elbridge Colby

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \ pm - 8:30 \ pm$ 

Thursday, July 25 Media Panel Discussion

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \ pm - 8:30 \ pm$ 

Friday, August 30 Day Trip w/ Mark Stoler, Ph.D.

The George C. Marshall International Center

Leesburg, VA

Thursday, September 5 Dinner & Discussion w/ Colin Dueck, Ph.D.

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \ pm - 8:00 \ pm$ 

Tuesday, September 17 Yalta Simulation Preparatory Session w/ Ted Bromund, Ph.D.

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \, pm - 8:30 \, pm$ 

Thursday - Friday, October 10-11 Staff Ride

Yalta Conference Simulation

Virginia Military Institute, Lexington, VA

We will depart mid-morning on Oct 10, and return on the 11th

Tuesday, October 29 Graduation Dinner w/ Frances Townsend

The Heritage Foundation, 214 Massachusetts Ave. NE

 $6:00 \ pm - 8:30 \ pm$ 

#### PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

	Sponsor(s) of the trip (please list all sponsors): The Heritage Foundation
-	Description of the trip:  It is an educational overnight trip to the Virginia Military Institute to provide the participants with the opportunity to learn about national security policy through a diplomacy exercise.
	Dates of travel: October 10-11, 2019
	Place of travel: Lexington, VA
	Name and title of Senate invitees: See attached.
	I certify that the trip fits one of the following categories:
	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
	l certify that:
	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.
	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B)  I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:
	(A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member. officer, or employee on any segment of the trip.  - OR -
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).  -OR -
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member. officer, or employee at any point throughout the trip.
10.	USE ONLY IF YOU CHECKED QUESTION 9(B)  If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:
} I.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:  See attached.
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:  See attached.
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:
	The Heritage Foundation has a long history of sponsoring congressional travel including trips to the
	historic Gettysburg battlefield, the Virginia Military Institute, and the National Museum of the Marine Corps
	at Quantico.

The Heritage Foundation conducts public policy research, publishes educational reports, and provides					
public seminars to promote discussion of ways to further our mission. Heritage also has staff throughout					
the country to meet	with citizens regarding iss	sues that are being	g debated in governme	nt today.	
Total Expenses for Each Participant:					
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses	
Good Faith estimate  Actual	\$100.00 - 32 passenger coach bus	\$96.00	\$100.00 - Lunch, Dinner, Breakfast, Lunch	\$5.00 - George C. Marshall Museum ticket	
Amounts					
articipation or b) th ongressional partici	trip involves an event that e trip involves an event the pation: event that is organized sp	nat is arranged or	organized <i>specifically</i> v	vith regard to	
congressional participation or b) the congressional participation. This trip involves an Reason for selecting	e trip involves an event the pation:	nat is arranged or becifically with reg	organized <i>specifically</i> v	vith regard to	
participation or b) the congressional participation.  This trip involves an Reason for selecting	e trip involves an event the pation: event that is organized sp	nat is arranged or becifically with reg	organized <i>specifically</i> v	vith regard to	
participation or b) the congressional participation.  This trip involves an Reason for selecting.  See attached.	e trip involves an event the pation: event that is organized sp	nat is arranged or becifically with reg	organized <i>specifically</i> v	vith regard to	
participation or b) the congressional participation. This trip involves an Reason for selecting. See attached.  Name and location of Hampton Inn	e trip involves an event the pation:  the location of the event of the event of the following factors are seen to the event of the even	nat is arranged or becifically with reg	organized <i>specifically</i> v	vith regard to	
participation or b) the congressional participation. This trip involves an Reason for selecting. See attached.  Name and location of Hampton Inn.  401 E Nelson St, Leading St	e trip involves an event the pation:  the location of the event of the event of the following factors are seen to the event of the even	pecifically with reg	organized <i>specifically</i> v	vith regard to	
Participation or b) the congressional participation. This trip involves an Reason for selecting. See attached.  Name and location of Hampton Inn.  401 E Nelson St, Leader Reason(s) for selecting.	e trip involves an event the pation:  event that is organized specified the location of the event of the location, VA 24450	nat is arranged or becifically with regonal acidity:	pard to congressional pa	articipation.	

Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):						
The Heritage Foundation conducts public policy research, publishes educational reports, and provides						
public seminars to promote discussion of ways to further our mission. Heritage also has staff throughout						
the country to meet wit	th citizens regarding iss	ues that are bein	g debated in governme	nt today.		
Total Expenses for Eac	Total Expenses for Each Participant:					
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses		
⊠ Good Faith estimate	\$100.00 - 32 passenger coach bus	\$96.00	\$100.00 - Lunch, Dinner, Breakfast, Lunch	\$5.00 - George C. Marshall Museum ticket		
Actual Amounts						
participation or b) the t congressional participa	trip involves an event the tion:	nat is arranged or	ganized without regard organized specifically was a gard to congressional parents.	vith regard to		
Reason for selecting the	e location of the event of	or trip				
See attached.	······································		· · · · · · · · · · · · · · · · · · ·			
Name and location of h	otel or other lodging fa	cility:				
Hampton Inn			<b>4</b>			
Reason(s) for selecting	hotel or other ladging	facility	· · · · · · · · · · · · · · · · · · ·	<u> </u>		
Reason(s) for selecting hotel or other lodging facility:  The Hampton Inn is close to the Virginia Military Institute and is able to host our group for a reasonable						
		· · · · · · · · · · · · · · · · · · ·	<b>3</b>			
price compared to the	other options.					

	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:				
	The expenses for meals are below the per diem rate, and the expenses for lodging are equal to the per				
	diem rate.				
•	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:				
	A 32-passenger coach bus has been chartered.				
•	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).				
•	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:				
	None provided.				
•	I hereby certify that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you must include a completed signature page for each additional sponsor):  Signature of Travel Sponsor:				
	Name and Title: Thomas Binion, Vice President of Government Relations				
	Name of Organization: The Heritage Foundation				
	Address: 214 Massachusetts Ave NE, Washington, D.C. 20002				
	Telephone Number: 202-608-6188				
	Fax Number:				
	E-mail Address: thomas.binion@heritage.org				

- Nic Adams, National Security Advisor, Office of Senator Joni Ernst
  Katherine Thompson, Legislative Correspondent, Office of Senator Mike Lee
  Michael Callesen, Policy Advisor, Senate Foreign Relations Committee
  Aaron Strickland, Deputy Military LA, Office of Senator Lindsey Graham
- 12) As the sole sponsor, The Heritage Foundation 501(C)(3) is hosting and planning this trip as part of an educational fellowship program. Each year, participants go to the Virginia Military Institute's George C. Marshall Museum for a simulation of the Yalta Conference. The participants will learn about the past decisions of national security policymakers alongside VMI cadets through this simulation exercise.
- 13) We are hosting this trip as per our mission to formulate and promote conservative public policies based on the principles of free enterprise, limited government, individual freedom, traditional American values, and a strong national defense. This trip is to further educate the attendees on national security lessons of the past, and how attendees can apply these national security policy lessons to strategic leadership and grand strategy today.
- 18) Each year, The Heritage Foundation's Marshall Fellowship goes to the Virginia Military Institute where it conducts a diplomacy exercise with a group of VMI cadets. The Virginia Military Institute was selected due to its rich history and access to military experts and is an ideal place to utilize as a national security policy education and diplomacy exercise site.

#### **Yalta Simulation**

# Thursday - Friday, October 10-11, 2019 The Marshall Foundation, Lexington, VA

#### Thursday, October 10, 2019

10:00 a.m.	Meet and Load Luggage	Heritage Lobby
10:30 a.m.	RMA Bus Departs from Heritage	
10:30 – 2:00 p.m.	Travel to Lexington, Virginia	
12:00 p.m.	Stop at Subway for Lunch 491 W Reservoir Rd. Woodstock, VA	
2:00 – 3:30 p.m.	Arrive at Marshall Museum for Tour 1600 VMI Parade, Lexington, VA *This helps participants understand the significance of General General Contribution to establishing American grand strategy; especially destine period in which the Yalta Conference took place.	**
3:30 p.m.	Museum Tour Ends/Depart for the Hampton Inn & Check-in Hampton Inn, 401 E Nelson St, Lexington, VA 24450	
4:15 p.m.	Bus will take Fellows back to The Marshall Museum 1600 VMI Parade, Lexington, VA	
4:30 – 6:00 p.m.	Fellows meet with Cadets on campus to discuss strategies for the significant of Dinner at Southern Inn Restaurant.  *The participants will meet with the VMI cadets for the first time in preparations for Friday's simulation event. Each cadet will then preparation project that relates to the historical context of the 1945 Year an analysis of German war reparations, the partitioning of Poland,	order to begin their esent his/her alta Conference (e.g.
6:00 p.m.	Reception/Dinner at Southern Inn Restaurant 37 South Main Street, Lexington, VA 24450	
6:30 p.m.	Dinner *Professor Dennis Foster, VMI faculty member, will give remarks to the Yalta Conference Simulation occurring the next day. Cadets the dinner and discussion.	~
8:00 p.m.	Dinner Concludes - Fellows/Cadets can choose to continue meeting evening	g or adjourn for the

#### Friday, October 11, 2019

7:00 a.m. Breakfast and Check-out Hampton Inn

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7:45 a.m.	Load Luggage onto the Bus	
8:00 a.m.	Bus Departs from the Hotel for the Marshall Museum	
8:30 a.m.	Yalta Simulation Begins 8:30 am - Plenary Session 1 8:30-8:35 - Call to order - Welcoming Remarks USSR 8:35-8:40 - Opening statement Great Britain 8:40-8:45 - Opening statement United States 8:45-8:50 - Opening statement USSR 8:50-9:20 - Consultations 9:20-9:50 - Breakout Negotiations 9:50-10:15 - Consultations	Auditorium*
	10:15 am - Plenary Session 2 10:15-11:15 - Breakout Negotiations 11:15-11:35 - Consultations 11:35-12:00 - Remarks from each country - where they stand	
	12:15 pm – Plenary Session 3 – Perceptions of the three delegations of agreement and differences 12:15-12:20 – Closing Statement USSR 12:20-12:25 – Closing Statement United States 12:25-12:30 – Closing Statement Great Britain	of where there is
12:30 p.m.	Simulation Concludes	
12:30 p.m.	Luncheon (to be setup outside of the main room) Lessons Learned Discussion	Auditorium
2:00 p.m.	Luncheon Concludes	
2:15 p.m.	Bus Departs from the Marshall Museum	
2:30 p.m.	Travel to The Heritage Foundation.	
5:30 p.m.	Bus Arrives at Heritage 214 Massachusetts Ave NE, Washington, DC	